

FOX RISING GEN FORUM™

MAY 5-6, 2019 | THE JOULE | DALLAS, TX



Our Spring event offers next generation family members a place to connect and build community with like-minded peers looking to engage in learning, shared experiences, and to develop skills as future family leaders. Family members in their 20s, 30s, and early 40s, who are aspiring leaders within their family's enterprise are invited to attend.

At FOX, we have found that a commitment to learning is a key characteristic for leaders. Many successful leaders are continuous learners who are driven to innovate through their innate curiosity and sense of discovery. Participants will:

- Learn how to effectively navigate challenging family conversations
- Understand the key components of a personal learning plan and begin to shape your own learning goals

- Strengthen your understanding of a complex family financial picture with practical information tailored to meet your own level of financial knowledge
- Create a personal brand statement that will succinctly articulate your unique gifts and what you bring to the family table

Along with the learning experience, participants will have the opportunity to build relationships with peers through roundtable discussions, shared meals, and other networking opportunities.

PRESENTERS



Heather Abramson

Regional Director Membership, West,
Family Office Exchange



Paulina Cromwell, CFA

Product Manager,
Family Office Exchange



Ann Dugan

Senior Managing Director,
Advisory and Education Services,
Family Office Exchange



Mindy Kalinowski Earley, CMP, CFBA

Chief Learning Officer,
FOX Family Learning Center,
Family Office Exchange



Dave Loomis

Founder and President,
Loomis Marketing, LLC

FOX RISING GEN ADVISORY BOARD



Hillary Elmore Cage

Elmore Companies



Austin McDonald

President and COO,
McDonald Development Company



Mercy Goddard

Vice President and Family Member,
Investment Resources Corporation



Mary Grace Hinkle

Director, Hinkle Holding Company and
MBA Candidate at UNC Kenan-Flagler
Business School

VENUE AND HOTEL ACCOMMODATIONS



The Joule Dallas
1530 Main Street
Dallas, TX 75201

www.thejouledallas.com

FOX has reserved a limited number of rooms at The Joule at a rate of \$294 per night plus applicable taxes. To obtain this discounted rate, please contact reservations at 1.214.748.1300 and mention Family Office Exchange.

Attendees are responsible for making their own accommodation arrangements. The cutoff date for hotel reservations at this special conference rate (subject to room availability) is **Thursday, April 11, 2019**.



Family Office Exchange is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.NASBARegistry.org.

Field of Study: Finance - Up to **6.5 CPE** credits can be earned by attending this event. CPE credits are accepted at the option of state certifying boards. Requirements, compliance procedures and acceptance may vary by state.

Program Level: Overview | No prerequisites are required for any of the sessions.
Delivery Method: Group Live Program

Learning Objectives: Upon completion of the program, participants will understand how to effectively navigate challenging family conversations, gain the key components of a personal learning plan, have a better understanding of a complex family financial picture, and how to craft and articulate a personal brand statement.

9:00 am FOX Rising Gen Gives Back
(Optional Activity)

Join your fellow FOX Rising Gen members in giving back to the local community. This service opportunity will be a hands-on experience to serve those in need in the Dallas area as well as provide a chance to get to know your fellow participants.

11:30 am Registration Opens

11:45 am Networking Luncheon

12:30 pm Welcome and Opening Remarks

12:45 pm DISCOVERY SESSION I

A highly valued benefit of participating in a FOX Rising Gen Forum is getting to know your peers in a safe space to explore the challenges and opportunities facing young people of wealth. We will “break the ice” and kick-off the Spring Forum with fun, interactive games designed to jump-start your networking.

1:15 pm Family Dynamics: Effective Family Conversations

Ann Dugan, Senior Managing Director, Education and Advisory Services, Family Office Exchange

Additional speaker to be announced

Navigating family dynamics can be challenging in any family, however, add the complexity of significant wealth or business ownership and those challenges can amplify. As a Rising Gen, knowing how to initiate and manage difficult conversations around substantive family issues such as conflict, succession, and engaging the next generation can be a powerful tool. Join two experienced family members who have journeyed these roads themselves and on the behalf of clients to gain practical tools for having effective conversations within your own family.

2:45 pm Networking Break

3:15 pm Creating a Personal Learning Plan

Mindy Kalinowski Earley, Chief Learning Officer, FOX Family Learning Center™ Family Office Exchange

Whether your goal is financial literacy, personal growth, or preparing for transition into leadership, having a clear plan to gain the skills, knowledge, and experience you need is essential. Understand components of an effective plan to help align your learning with your values, goals, and ambitions.

4:15 pm Rising Gen Peer Dialogue

Participants will choose a topic and join in facilitated discussions with peers.

5:30 pm Sunday Agenda Concludes

6:30 pm Cocktail Reception & Dinner

“Rising Gen events give us an opportunity to start building relationships now with others who are facing similar issues. Being involved in Rising Gen means we’re not doing any of this alone, and we will be able to support and celebrate each other for many years to come.”

*-FOX Rising Gen
Advisory Board Member*

8:00 am Breakfast and Registration

9:00 am Opening Remarks

9:05 am DISCOVERY SESSION II

What Do You Want the Leadership Generation to Know?

Using a brainwriting exercise, we will define the issues and ideas that you want the Leadership Generation to know about your interests, capabilities, and goals.

9:45 am Three Degrees of Engagement in Personal Investing

Speakers to be announced

Whether you are an experienced investor or just learning to understand a financial statement, these sessions will provide you with information to better grasp your own and your family's financial picture and give you hands-on strategies to apply your learnings.

- An introductory session will focus on financial literacy, including: budgeting, banking and credit, taxes, and financial institutions.
- An intermediate session will focus on investment strategy, including: establishing objectives, return and risk measures, defining asset classes, and setting asset allocation.
- An advanced session will go deeper into investment portfolio mechanics, with topics including: investment vehicles and management styles, factor construction, and liquidity management.

11:45 am Networking Luncheon and Peer Dialogue: Life Stages

While we are all part of the Rising Generation, many of us are at different stages in life, encountering challenges and opportunities unique to that life stage. This Luncheon will provide a chance to talk with peers who share a similar life stage including:

- The Single Life
- Engaging Your Spouse/Partner in the Family Enterprise
- Parents: Involving the Kids
- Stepping into the Leadership Generation

12:45 pm Developing Your Personal Brand

Dave Loomis, Founder and President, Loomis Marketing, LLC

Branding isn't limited to marketing a product, service, or business. Articulating a personal brand – a statement about who you are and what you have to offer – is a powerful way to direct your career development and control how you are perceived within your family. This interactive session will guide you through the process of creating your personal brand and explore how you can bring it to life.

1:45 pm Closing Remarks and Staying Connected



2018 FOX Rising Gen Forum, Chicago

REGISTRATION QUESTIONS

Registration for the FOX Rising Gen is open to family members in their 20s, 30s, and early 40s, who are aspiring leaders within their family's enterprise. All registrations subject to approval by FOX.

Please select your age range:

- 20-29 30-39 40+

Please select your generation:

- Gen 1 Gen 2 Gen 3 Gen 4
 Gen 5 Unknown Not Applicable

I play an active role in the family business:

- Yes No Preparing to

What is your role in the family business? (current or potential role)

Please select a section for the Three Degrees of Engagement in Personal Investing session:

- Introductory: Financial Literacy
 Intermediate: Investment Strategy
 Advanced: Investment Portfolio Mechanics

My biggest challenge as a member of the rising generation is:

Will you attend FOX Rising Gen Gives Back on Sunday, May 5 at 9:00 am?

- Yes No

Will you attend the following meals?

- Networking Luncheon, May 5
 Cocktail Reception and Dinner, May 5
 Breakfast, May 6
 Networking Luncheon, May 6

Do you plan to book a guest room at The Joule Dallas?

- Yes, I plan to stay at The Joule.
 No, I do not plan to stay at The Joule.
 I'm not sure, my plans are not finalized.

QUESTIONS?

Contact us at events@familyoffice.com or call 312.327.1221

FOX DIRECT INVESTING DINNER, MONDAY, MAY 6

6:00 pm - Location TBA
 Open to Single Family Offices and Wealth Owners.

Join us for the Direct Investing Dinner on May 6, following the Forum. This dinner, focused on bringing together families with an active interest in direct investing, offers you the chance to meet other like-minded investors and engage in meaningful dialogue around deal flow and related topics.

- I will attend I will not attend

THREE WAYS TO REGISTER

1. Scan and email to: events@familyoffice.com | 2. Register online at: www.familyoffice.com/rg2019 | 3. Fax this form to: 1.312.327.1212

Space is limited. All attendees must register online or submit this registration form prior to the event to secure a seat.

ATTENDEE INFORMATION: Select information will be used for your forum badge, including city and state.

Name (First/Last)

Name of Firm/Family Office

Title/Position

Street Address

City

State/Province

Country

Zip/Postal Code

Phone

E-mail

Do you have any dietary or special needs?

REGISTRATION FEES

FOX Member

- Use Event Credit Included in FOX Membership Fee

FOX Member

- First Paid Attendee \$1,300
 Additional Paid Attendees \$1,175

FOX Non-Member*

- First Paid Attendee \$1,625
 Additional Paid Attendees \$1,450

If you are not a member of Family Office Exchange, please contact info@familyoffice.com for membership information.

PAYMENT METHOD

- Payment by check is enclosed. (Check payable in U.S. dollars to Family Office Exchange)

Please mail check and this registration form to:

Family Office Exchange
ATTN: Events
100 South Wacker Drive, Suite 800, Chicago, IL 60606

- To pay by credit card please call the Events Team directly at 1.312.327.1221 and provide credit card details or register online at familyoffice.com/rg2019.
 Note: credit card payments over \$7,500.00 are subject to a 3.5% fee on the entire payment.

For event registrations, refunds of payment or forum allotments will be offered if the cancellation is made in writing to Family Office Exchange at events@familyoffice.com five (5) or more business days prior to the start of the event. For more information regarding complaints or administrative policies please call 312-327-1200.